

Label (See instructions on page 14.) Use the IRS label. Otherwise, please print or type. Presidential Election Campaign	L A B E L H E R E	For the year Jan. 1-Dec. 31, 2009, or other tax year beginning _____, 2009, ending _____, 20		OMB No. 1545-0074
		Your first name and initial CARL M.	Last name LEVIN	Your social security number [REDACTED]
		If a joint return, spouse's first name and initial BARBARA	Last name LEVIN	Spouse's social security number [REDACTED]
		Home address (number and street). If you have a P.O. box, see page 14. [REDACTED]		Apt. no. [REDACTED]
		City, town or post office, state, and ZIP code. If you have a foreign address, see page 14. [REDACTED]		You must enter ▲ your SSN(s) above. ▲
Checking a box below will not change your tax or refund. <input type="checkbox"/> You <input checked="" type="checkbox"/> Spouse				

Election Campaign Check here if you, or your spouse if filing jointly, want \$3 to go to this fund (see page 14) ☒ You ☒ Spouse

Filing Status

- 1 ☐ Single
 2 ☒ Married filing jointly (even if only one had income)
 3 ☐ Married filing separately. Enter spouse's SSN above and full name here. ☐ Qualifying widow(er) with dependent child (see page 16)
 4 ☐ Head of household (with qualifying person). If the qualifying person is a child but not your dependent, enter this child's name here. ☐

Check only one box.

Exemptions

- 6a ☒ Yourself. If someone can claim you as a dependent, do not check box 6a
 b ☒ Spouse
 c Dependents:
 (1) First name Last name (2) Dependent's social security number (3) Dependent's relationship to you (4) If qualifying child for child tax credit (see page 17)
 d Total number of exemptions claimed **2**

If more than four dependents, see page 17 and check here ☐

Income

Attach Form(s) W-2 here. Also attach Forms W-2G and 1099-R if tax was withheld.

If you did not get a W-2, see page 22.

Enclose, but do not attach, any payment. Also, please use Form 1040-V.

- | | | | |
|-----|---|-----|----------|
| 7 | Wages, salaries, tips, etc. Attach Form(s) W-2 | 7 | 146,987. |
| 8a | Taxable interest. Attach Schedule B if required | 8a | 104. |
| b | Tax-exempt interest. Do not include on line 8a | 8b | 35. |
| 9a | Ordinary dividends. Attach Schedule B if required | 9a | |
| b | Qualified dividends (see page 22) | 9b | |
| 10 | Taxable refunds, credits, or offsets of state and local income taxes | 10 | 0. |
| 11 | Alimony received | 11 | |
| 12 | Business income or (loss). Attach Schedule C or C-EZ | 12 | |
| 13 | Capital gain or (loss). Attach Schedule D if required. If not required, check here <input type="checkbox"/> | 13 | |
| 14 | Other gains or (losses). Attach Form 4797 | 14 | |
| 15a | IRA distributions | 15a | |
| 15b | Taxable amount | 15b | 8,994. |
| 16a | Pensions and annuities | 16a | |
| 16b | Taxable amount | 16b | 26,053. |
| 17 | Rental real estate, royalties, partnerships, S corporations, trusts, etc. Attach Schedule E | 17 | |
| 18 | Farm income or (loss). Attach Schedule F | 18 | |
| 19 | Unemployment compensation in excess of \$2,400 per recipient (see page 27) | 19 | |
| 20a | Social security benefits | 20a | 41,855. |
| 20b | Taxable amount (see page 27) | 20b | 35,577. |
| 21 | Other income. List type and amount (see page 29) | 21 | |
| 22 | Add the amounts in the far right column for lines 7 through 21. This is your total income | 22 | 217,715. |

Adjusted Gross Income

- | | | | |
|-----|--|-----|----------|
| 23 | Educator expenses (see page 29) | 23 | |
| 24 | Certain business expenses of reservists, performing artists, and fee-basis government officials. Attach Form 2106 or 2106-EZ | 24 | |
| 25 | Health savings account deduction. Attach Form 8889 | 25 | |
| 26 | Moving expenses. Attach Form 3903 | 26 | |
| 27 | One-half of self-employment tax. Attach Schedule SE | 27 | |
| 28 | Self-employed SEP, SIMPLE, and qualified plans | 28 | |
| 29 | Self-employed health insurance deduction (see page 30) | 29 | |
| 30 | Penalty on early withdrawal of savings | 30 | |
| 31a | Alimony paid b Recipient's SSN | 31a | |
| 32 | IRA deduction (see page 31) | 32 | |
| 33 | Student loan interest deduction (see page 34) | 33 | |
| 34 | Tuition and fees deduction. Attach Form 8917 | 34 | |
| 35 | Domestic production activities deduction. Attach Form 8903 | 35 | |
| 36 | Add lines 23 through 31a and 32 through 35 | 36 | |
| 37 | Subtract line 36 from line 22. This is your adjusted gross income | 37 | 217,715. |

Tax and Credits

Standard Deduction for -

• People who check any box on line 39a, 39b, or 40b of who can be claimed as a dependent.

• All others:

Single or Married filing separately, \$5,700

Married filing jointly or Qualifying widow(er), \$11,400

Head of household, \$8,350

38 Amount from line 37 (adjusted gross income)

38 217,715.

39a Check ☒ You were born before January 2, 1945, ☐ Blind. Total boxes checked ... 39a 2b If your spouse itemizes on a separate return or you were a dual-status alien, see page 35 and check here ... 39b ☐

40a Itemized deductions (from Schedule A) or your standard deduction (see left margin)

40a 55,527.

b If you are increasing your standard deduction by certain real estate taxes, new motor vehicle taxes, or a net disaster loss, attach Schedule L and check here (see page 35) ... 40b ☐

41 Subtract line 40a from line 38

41 162,188.

42 Exemptions. If line 38 is \$125,100 or less and you did not provide housing to a Midwestern displaced individual, multiply \$3,650 by the number on line 6d. Otherwise, see page 37

42 7,300.

43 Taxable income. Subtract line 42 from line 41. If line 42 is more than line 41, enter -0-

43 154,888.

44 Tax. Check if any tax is from: a ☐ Form(s) 8814 b ☐ Form 4972

44 31,632.

45 Alternative minimum tax. Attach Form 6251

45 327.

46 Add lines 44 and 45

46 31,959.

47 Foreign tax credit. Attach Form 1116 if required

47

48 Credit for child and dependent care expenses. Attach Form 2441

48

49 Education credits from Form 8863, line 29

49

50 Retirement savings contributions credit. Attach Form 8880

50

51 Child tax credit (see page 42)

51

52 Credits from Form: a ☐ 8396 b ☐ 8839 c ☐ 5695

52

53 Other credits from Form: a ☐ 3800 b ☐ 8801 c ☐

53

54 Add lines 47 through 53. These are your total credits

54

55 Subtract line 54 from line 46. If line 54 is more than line 46, enter -0-

55 31,959.

Other Taxes

56 Self-employment tax. Attach Schedule SE

56

57 Unreported social security and Medicare tax from Form: a ☐ 4137 b ☐ 8919

57

58 Additional tax on IRAs, other qualified retirement plans, etc. Attach Form 5329 if required

58

59 Additional taxes: a ☐ AEIC payments b ☒ Household employment taxes. Attach Schedule H

59 783.

60 Add lines 55 through 59. This is your total tax

60 32,742.

Payments

61 Federal income tax withheld from Forms W-2 and 1099

61

45,491.

62 2009 estimated tax payments and amount applied from 2008 return

62

63 Making work pay and government retiree credits. Attach Schedule M

63

64a Earned income credit (EIC)

64a

b Nontaxable combat pay election

64b

65 Additional child tax credit. Attach Form 8812

65

66 Refundable education credit from Form 8863, line 16

66

67 First-time homebuyer credit. Attach Form 5405

67

68 Amount paid with request for extension to file (see page 72)

68

69 Excess social security and tier 1 RRTA tax withheld (see page 72)

69

70 Credits from Form: a ☐ 2439 b ☐ 4136 c ☒ 8801 d ☐ 8885

70

17.

71 Add lines 61, 62, 63, 64a, and 65 through 70. These are your total payments

71 45,508.

72 If line 71 is more than line 60, subtract line 60 from line 71. This is the amount you overpaid

72 12,766.

73a Amount of line 72 you want refunded to you. If Form 8888 is attached, check here

73a 12,766.

b Routing number ☐ c Type: ☐ Checking ☐ Savings d Account number ☐

74 Amount of line 72 you want applied to your 2010 estimated tax

74

75 Amount you owe. Subtract line 71 from line 60. For details on how to pay, see page 74

75

76 Estimated tax penalty (see page 74)

76

Direct deposit? See page 73 and fill in 73b, 73c, and 73d, or Form 8888.

Amount You Owe

Third Party Designee

Do you want to allow another person to discuss this return with the IRS (see page 75)? ☒ Yes. Complete the following. ☐ NoDesignee's name **HAROLD GROSSBART**Phone no. **248-372-7300**Personal identification number (PIN) **[REDACTED]**

Sign Here

Under penalties of perjury, I declare that I have examined this return and accompanying schedules and statements, and to the best of my knowledge and belief, they are true, correct, and complete. Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge.

Your signature

Date

Your occupation

Daytime phone number

Spouse's signature. If a joint return, both must sign.

Date

Spouse's occupation

RETIRED

Paid Preparer's Use Only

Preparer's signature

HAROLD GROSSBART

Date

05/24/10

Check if self-employed ☐

Preparer's SSN or PTIN

Firm's name (or yours if self-employed), address, and ZIP code

BAKER TILLY VIRCHOW KRAUSE, LLP

ONE TOWNE SQUARE, SUITE 600

SOUTHFIELD, MI 48076

EIN

Phone no. 248-372-7300

**SCHEDULE A
(Form 1040)**

Department of the Treasury
Internal Revenue Service (99)

Itemized Deductions

▶ Attach to Form 1040. ▶ See Instructions for Schedule A (Form 1040).

OMB No. 1545-0074

2009

Attachment
Sequence No. 07

Name(s) shown on Form 1040

Your social security number

CARL M. & BARBARA LEVIN

**Medical
and
Dental
Expenses**

Caution. Do not include expenses reimbursed or paid by others.

- 1 Medical and dental expenses (See page A-1.) 1
- 2 Enter amount from Form 1040, line 38 2
- 3 Multiply line 2 by 7.5% (.075) 3
- 4 Subtract line 3 from line 1. If line 3 is more than line 1, enter -0- 4

**Taxes You
Paid**

(See
page A-2.)

- 5 State and local (check only one box):
- a ☒ Income taxes, or
- b ☐ General sales taxes
- 6 Real estate taxes (See page A-5.) 6
- 7 New motor vehicle taxes from line 11 of the worksheet on page 2.
Skip this line if you checked box 5b 7
- 8 Other taxes. List type and amount ▶
SEE STATEMENT 9 8
- 9 Add lines 5 through 8 9

11,738.

4,390.

3,176.

19,304.

**Interest
You Paid**

(See
page A-6.)

Note.
Personal
interest is
not
deductible.

- 10 Home mortgage interest and points reported to you on Form 1098 10
- 11 Home mortgage interest not reported to you on Form 1098. If paid to the person
from whom you bought the home, see page A-7 and show that person's name,
identifying no., and address 11
- 12 Points not reported to you on Form 1098 12
- 13 Qualified mortgage insurance premiums (See page A-7.) 13
- 14 Investment interest. Attach Form 4952 if required. (See page A-8.) 14
- 15 Add lines 10 through 14 15

32,747.

32,747.

**Gifts to
Charity**

If you made a
gift and got a
benefit for it,
see page A-8.

- 16 Gifts by cash or check SEE STATEMENT 10 16
- 17 Other than by cash or check. If any gift of \$250 or more, see page A-8.
You must attach Form 8283 if over \$500 17
- 18 Carryover from prior year 18
- 19 Add lines 16 through 18 19

32,747.

**Casualty and
Theft Losses**

- 20 Casualty or theft loss(es). Attach Form 4684. (See page A-10.) 20

**Job Expenses
and Certain
Miscellaneous
Deductions**

(See
page A-10.)

- 21 Unreimbursed employee expenses - job travel, union dues, job education, etc.
Attach Form 2106 or 2106-EZ if required. (See page A-10.) 21
- 22 Tax preparation fees 22
- 23 Other expenses - investment, safe deposit box, etc. List type and amount
▶ EXPENSES FOR MEMBER OF CONGRESS 23
- 24 Add lines 21 through 23 24
- 25 Enter amount from Form 1040, line 38 25 217,715. 25
- 26 Multiply line 25 by 2% (.02) 26
- 27 Subtract line 26 from line 24. If line 26 is more than line 24, enter -0- 27

985.

7,354.

8,339.

4,354.

3,985.

**Other
Miscellaneous
Deductions**

- 28 Other - from list on page A-11. List type and amount 28

**Total
Itemized
Deductions**

- 29 Is Form 1040, line 38, over \$166,800 (over \$83,400 if married filing separately)?
- ☐ No. Your deduction is not limited. Add the amounts in the far right column
for lines 4 through 28. Also, enter this amount on Form 1040, line 40a.
- ☒ Yes. Your deduction may be limited. See page A-11 for the amount to enter.

STMT 11 ▶ 55,527.

- 30 If you elect to itemize deductions even though they are less than your standard deduction, check here ▶ ☐

Worksheet Before you begin: ☒ You cannot take this deduction if the amount on Form 1040, line 38, is equal to or greater than \$135,000 (\$260,000 if married filing jointly).
for Line 7 - ☒ See the instructions for line 7 on page A-6.
New motor vehicle taxes

Use this worksheet to figure the amount to enter on line 7.

(Keep a copy for your records.)

1 Enter the state or local sales or excise taxes you paid in 2009 for the purchase of any new motor vehicle(s) after February 16, 2009 (see page A-6)	1		
2 Enter the purchase price (before taxes) of the new motor vehicle(s)	2		
3 Is the amount on line 2 more than \$49,500? <input type="checkbox"/> No. Enter the amount from line 1. <input type="checkbox"/> Yes. Figure the portion of the tax from line 1 that is attributable to the first \$49,500 of the purchase price of each new motor vehicle and enter it here (see page A-6).			3
4 Enter the amount from Form 1040, line 38	4		
5 Enter the total of any - • Amounts from Form 2555, lines 45 and 50; Form 2555-EZ, line 18; and Form 4563, line 15, and • Exclusion of income from Puerto Rico	5		
6 Add lines 4 and 5	6		
7 Enter \$125,000 (\$250,000 if married filing jointly)	7		
8 Is the amount on line 6 more than the amount on line 7? <input type="checkbox"/> No. Enter the amount from line 3 above on Schedule A, line 7. Do not complete the rest of this worksheet. <input type="checkbox"/> Yes. Subtract line 7 from line 6	8		
9 Divide the amount on line 8 by \$10,000. Enter the result as a decimal (rounded to at least three places). If the result is 1.000 or more, enter 1.000	9		
10 Multiply line 3 by line 9			10
11 Deduction for new motor vehicle taxes. Subtract line 10 from line 3. Enter the result here and on Schedule A, line 7			11

Schedule A (Form 1040) 2009

SCHEDULE B
(Form 1040A or 1040)

Department of the Treasury
Internal Revenue Service (99)
Name(s) shown on return

Interest and Ordinary Dividends

▶ Attach to Form 1040A or 1040.

▶ See instructions.

OMB No. 1545-0074

2009

Attachment
Sequence No. **08**

Your social security number

CARL M. & BARBARA LEVIN

Part I
Interest

- 1 List name of payer. If any interest is from a seller-financed mortgage and the buyer used the property as a personal residence, see page B-1 and list this interest first. Also, show that buyer's social security number and address ▶

FIDELITY #
NATIONAL CAPITAL BANK
U.S. SENATE FEDERAL CREDIT UNION
FROM K-1 - LRS COMPANY

Note: If you received a Form 1099-INT, Form 1099-OID, or substitute statement from a brokerage firm, list the firm's name as the payer and enter the total interest shown on that form.

Amount

35.
10.
89.
5.

SUBTOTAL FOR LINE 1

139.

TAX-EXEMPT INTEREST

SEE STATEMENT 12

-35.

- 2 Add the amounts on line 1
3 Excludable interest on series EE and I U.S. savings bonds issued after 1989.
Attach Form 8815
4 Subtract line 3 from line 2. Enter the result here and on Form 1040A, or Form 1040, line 8a ▶

104.

104.

Note: If line 4 is over \$1,500, you must complete Part III.

Part II
Ordinary Dividends

- 5 List name of payer ▶

Note: If you received a Form 1099-DIV or substitute statement from a brokerage firm, list the firm's name as the payer and enter the ordinary dividends shown on that form.

Amount

- 6 Add the amounts on line 5. Enter the total here and on Form 1040A, or Form 1040, line 9a ▶

Note: If line 6 is over \$1,500, you must complete Part III.

Part III
Foreign Accounts and Trusts

You must complete this part if you (a) had over \$1,500 of taxable interest or ordinary dividends; (b) had a foreign account; or (c) received a distribution from, or were a grantor of, or a transferor to, a foreign trust.

- 7a At any time during 2009, did you have an interest in or a signature or other authority over a financial account in a foreign country, such as a bank account, securities account, or other financial account? See page B-2 for exceptions and filing requirements for Form TD F 90-22.1
b If "Yes," enter the name of the foreign country ▶

Yes

No

X

- 8 During 2009, did you receive a distribution from, or were you the grantor of, or transferor to, a foreign trust?
If "Yes," you may have to file Form 3520. See page B-2

X

SCHEDULE E

(Form 1040)

Department of the Treasury
Internal Revenue Service (99)

Supplemental Income and Loss

(From rental real estate, royalties, partnerships,
S corporations, estates, trusts, REMICs, etc.)

▶ Attach to Form 1040, 1040NR, or Form 1041.

▶ See Instructions for Schedule E (Form 1040).

OMB No. 1545-0074

2009

Attachment
Sequence No. **13**

Name(s) shown on return

Your social security number

CARL M. & BARBARA LEVIN

Part I **Income or Loss From Rental Real Estate and Royalties** Note. If you are in the business of renting personal property, use Schedule C or C-EZ (see page E-3). If you are an individual, report farm rental income or loss from Form 4835 on page 2, line 40.

1	List the type and address of each rental real estate property:	2	For each rental real estate property listed on line 1, did you or your family use it during the tax year for personal purposes for more than the greater of:	Yes	No
A	RENTAL PORTION OF RESIDENCE [REDACTED]		• 14 days or	A	X
B			• 10% of the total days rented at fair rental value?	B	
C			(See page E-3)	C	

Income:		Properties			Totals
		A	B	C	(Add columns A, B, and C.)
3	Rents received	3	14,400.		3 14,400.
4	Royalties received	4			4
Expenses:					
5	Advertising	5			
6	Auto and travel (see page E-4)	6			
7	Cleaning and maintenance	7			
8	Commissions	8			
9	Insurance	9	621.		
10	Legal and other professional fees	10			
11	Management fees	11			
12	Mortgage interest paid to banks, etc. (see page E-5)	12			12
13	Other interest	13			
14	Repairs	14			
15	Supplies	15			
16	Taxes	16	2,190.		
17	Utilities	17	1,161.		
18	Other (list) ▶ SEE STATEMENT 13	18	1,453.		
19	Add lines 5 through 18	19	5,425.		19 5,425.
20	Depreciation expense or depletion (see page E-5)	20	531.		20 531.
21	Total expenses. Add lines 19 and 20	21	5,956.		
22	Income or (loss) from rental real estate or royalty properties. Subtract line 21 from line 3 (rents) or line 4 (royalties). If the result is a (loss), see page E-5 to find out if you must file Form 6198.	22	8,444.		
23	Deductible rental real estate loss. Caution. Your rental real estate loss on line 22 may be limited. See page E-5 to find out if you must file Form 8582. Real estate professionals must complete line 43 on page 2	23			
24	Income. Add positive amounts shown on line 22. Do not include any losses	24			8,444.
25	Losses. Add royalty losses from line 22 and rental real estate losses from line 23. Enter total losses here	25			()
26	Total rental real estate and royalty income or (loss). Combine lines 24 and 25. Enter the result here. If Parts II, III, IV, and line 40 on page 2 do not apply to you, also enter this amount on Form 1040, line 17, or Form 1040NR, line 18. Otherwise, include this amount in the total on line 41 on page 2	26			8,444.

Name(s) shown on return. Do not enter name and social security number if shown on page 1.

Your social security number

CARL M. & BARBARA LEVIN

Caution. The IRS compares amounts reported on your tax return with amounts shown on Schedule(s) K-1.

Part II Income or Loss From Partnerships and S Corporations Note. If you report a loss from an at-risk activity for which any amount is not at risk, you must check column (e) on line 28 and attach Form 6198. See page E-1.

- 27 Are you reporting any loss not allowed in a prior year due to the at-risk or basis limitations, a prior year unallowed loss from a passive activity (if that loss was not reported on Form 8582), or unreimbursed partnership expenses? ☒ Yes ☐ No
If you answered "Yes," see page E-7 before completing this section.

28	(a) Name	(b) Enter P for partnership, S for S corporation	(c) Check if foreign partnership	(d) Employer identification number	(e) Check if any amount is not at risk
A	LRS COMPANY	P			X
B	AT RISK CARRYOVER	P			X
C	LEVINSON-LEVIN PROPERTIES, LLC	P			
D					

Passive Income and Loss			Nonpassive Income and Loss		
(f) Passive loss allowed (attach Form 8582 if required)		(g) Passive income from Schedule K-1	(h) Nonpassive loss from Schedule K-1	(i) Section 179 expense deduction from Form 4562	(j) Nonpassive income from Schedule K-1
A	1.				
B	4.				
C		17,614.			
D					
29a	Totals	17,614.			
b	Totals	5.			
30	Add columns (g) and (j) of line 29a			30	17,614.
31	Add columns (f), (h), and (i) of line 29b			31	(5.)
32	Total partnership and S corporation income or (loss). Combine lines 30 and 31. Enter the result here and include in the total on line 41 below			32	17,609.

Part III Income or Loss From Estates and Trusts

33	(a) Name	(b) Employer identification number
A		
B		
Passive Income and Loss		Nonpassive Income and Loss
(c) Passive deduction or loss allowed (attach Form 8582 if required)		(d) Passive income from Schedule K-1
(e) Deduction or loss from Schedule K-1		(f) Other income from Schedule K-1
A		
B		
34a	Totals	
b	Totals	
35	Add columns (d) and (f) of line 34a	35
36	Add columns (c) and (e) of line 34b	36 ()
37	Total estate and trust income or (loss). Combine lines 35 and 36. Enter the result here and include in the total on line 41 below	37

Part IV Income or Loss From Real Estate Mortgage Investment Conduits (REMICs) - Residual Holder

38	(a) Name	(b) Employer identification number	(c) Excess inclusion from Schedules Q, line 2c	(d) Taxable income (net loss) from Schedules Q, line 1b	(e) Income from Schedules Q, line 3b
39	Combine columns (d) and (e) only. Enter the result here and include in the total on line 41 below				39

Part V Summary

40	Net farm rental income or (loss) from Form 4835. Also, complete line 42 below	40	
41	Total income or (loss). Combine lines 26, 32, 37, 39, and 40. Enter the result here and on Form 1040, line 17, or Form 1040NR, line 18	41	26,053.
42	Reconciliation of farming and fishing income. Enter your gross farming and fishing income reported on Form 4835, line 7; Schedule K-1 (Form 1065), box 14, code B; Schedule K-1 (Form 1120S), box 17, code U; and Schedule K-1 (Form 1041), line 14, code F (see page E-8)	42	
43	Reconciliation for real estate professionals. If you were a real estate professional (see page E-2), enter the net income or (loss) you reported anywhere on Form 1040 or Form 1040NR from all rental real estate activities in which you materially participated under the passive activity loss rules	43	

Form **6198**(Rev. November 2009)
Department of the Treasury
Internal Revenue Service**At-Risk Limitations**

- ▶ Attach to your tax return.
▶ See separate instructions.

OMB No. 1545-0712

Attachment
Sequence No. **31**

Name(s) shown on return

Identifying number

CARL M. LEVIN

Description of activity (see page 2 of the instructions)

LRS COMPANY**Part I Current Year Profit (Loss) From the Activity, Including Prior Year Nondeductible Amounts.** See page 2 of the instructions.

1	Ordinary income (loss) from the activity (see page 2 of the instructions)	1	-3,364.
2	Gain (loss) from the sale or other disposition of assets used in the activity (or of your interest in the activity) that you are reporting on:		
a	Schedule D	2a	
b	Form 4797	2b	
c	Other form or schedule	2c	
3	Other income and gains from the activity, from Schedule K-1 of Form 1065, Form 1065-B, or Form 1120S, that were not included on lines 1 through 2c	3	5.
4	Other deductions and losses from the activity, including investment interest expense allowed from Form 4952, that were not included on lines 1 through 2c	4	()
5	Current year profit (loss) from the activity. Combine lines 1 through 4. See page 3 of the instructions before completing the rest of this form	5	-3,359.

Part II Simplified Computation of Amount At Risk. See page 3 of the instructions before completing this part.

6	Adjusted basis (as defined in section 1011) in the activity (or in your interest in the activity) on the first day of the tax year. Do not enter less than zero	6	0.
7	Increases for the tax year (see page 3 of the instructions)	7	
8	Add lines 6 and 7	8	
9	Decreases for the tax year (see page 4 of the instructions)	9	
10a	Subtract line 9 from line 8	10a	
b	If line 10a is more than zero, enter that amount here and go to line 20 (or complete Part III). Otherwise, enter -0- and see Pub. 925 for information on the recapture rules	10b	

Part III Detailed Computation of Amount At Risk.

If you completed Part III of Form 6198 for the prior year, see page 4 of the instructions.

11	Investment in the activity (or in your interest in the activity) at the effective date. Do not enter less than zero	11	
12	Increases at effective date	12	
13	Add lines 11 and 12	13	
14	Decreases at effective date	14	
15	Amount at risk (check box that applies):		
a	<input type="checkbox"/> At effective date. Subtract line 14 from line 13. Do not enter less than zero.		
b	<input type="checkbox"/> From your prior year Form 6198, line 19b. Do not enter the amount from line 10b of your prior year form.	15	
16	Increases since (check box that applies):		
a	<input type="checkbox"/> Effective date	16	
b	<input type="checkbox"/> The end of your prior year	17	
17	Add lines 15 and 16	17	
18	Decreases since (check box that applies):		
a	<input type="checkbox"/> Effective date	18	
b	<input type="checkbox"/> The end of your prior year	19a	
19a	Subtract line 18 from line 17	19a	
b	If line 19a is more than zero, enter that amount here and go to line 20. Otherwise, enter -0- and see Pub. 925 for information on the recapture rules	19b	

Part IV Deductible Loss

20	Amount at risk. Enter the larger of line 10b or line 19b	20	0.
21	Deductible loss. Enter the smaller of the line 5 loss (treated as a positive number) or line 20. See the instructions to find out how to report any deductible loss and any carryover	21	() 0.

Note: If the loss is from a passive activity, see the Instructions for Form 8582, Passive Activity Loss Limitations, or the Instructions for Form 8810, Corporate Passive Activity Loss and Credit Limitations, to find out if the loss is allowed under the passive activity rules. If only part of the loss is subject to the passive activity loss rules, report only that part on Form 8582 or Form 8810, whichever applies.

Alternative Minimum Tax - Individuals

► Attach to Form 1040 or Form 1040NR.

OMB No. 1545-0074

2009

Attachment
Sequence No. **32**

Name(s) shown on Form 1040 or Form 1040NR

Your social security number

CARL M. & BARBARA LEVIN

Part I Alternative Minimum Taxable Income

1	If filing Schedule A (Form 1040), enter the amount from Form 1040, line 41 (minus any amount on Form 8914, line 6), and go to line 2. Otherwise, enter the amount from Form 1040, line 38 (minus any amount on Form 8914, line 6), and go to line 7. (If less than zero, enter as a negative amount.)	1	162,188.
2	Medical and dental. Enter the smaller of Schedule A (Form 1040), line 4, OR 2.5% (.025) of Form 1040, line 38. If zero or less, enter -0-	2	
3	Taxes from Schedule A (Form 1040), lines 5, 6, and 8	3	19,304.
4	Enter the home mortgage interest adjustment, if any, from line 6 of the worksheet on page 2 of the instructions	4	
5	Miscellaneous deductions from Schedule A (Form 1040), line 27	5	3,985.
6	If Form 1040, line 38, is over \$166,800 (over \$83,400 if married filing separately), enter the amount from line 11 of the Itemized Deductions Worksheet on page A-11 of the instructions for Schedule A (Form 1040)	6	-509.
7	If filing Schedule L (Form 1040A or 1040), enter as a negative amount the sum of lines 6 and 20 from that schedule	7	
8	Tax refund from Form 1040, line 10 or line 21	8	
9	Investment interest expense (difference between regular tax and AMT)	9	
10	Depletion (difference between regular tax and AMT)	10	
11	Net operating loss deduction from Form 1040, line 21. Enter as a positive amount	11	
12	Alternative tax net operating loss deduction	12	
13	Interest from specified private activity bonds exempt from the regular tax SEE STATEMENT 18	13	18.
14	Qualified small business stock (7% of gain excluded under section 1202)	14	
15	Exercise of incentive stock options (excess of AMT income over regular tax income)	15	
16	Estates and trusts (amount from Schedule K-1 (Form 1041), box 12, code A)	16	
17	Electing large partnerships (amount from Schedule K-1 (Form 1065-B), box 6)	17	
18	Disposition of property (difference between AMT and regular tax gain or loss)	18	
19	Depreciation on assets placed in service after 1986 (difference between regular tax and AMT)	19	
20	Passive activities (difference between AMT and regular tax income or loss) SEE STATEMENT 16	20	108.
21	Loss limitations (difference between AMT and regular tax income or loss)	21	
22	Circulation costs (difference between regular tax and AMT)	22	
23	Long-term contracts (difference between AMT and regular tax income)	23	
24	Mining costs (difference between regular tax and AMT)	24	
25	Research and experimental costs (difference between regular tax and AMT)	25	
26	Income from certain installment sales before January 1, 1987	26	
27	Intangible drilling costs preference	27	
28	Other adjustments, including income-based related adjustments	28	
29	Alternative minimum taxable income. Combine lines 1 through 28. (If married filing separately and line 29 is more than \$216,900, see instructions.)	29	185,094.

Part II Alternative Minimum Tax (AMT)

30	Exemption. (If you were under age 24 at the end of 2009, see instructions.) IF your filing status is ... AND line 29 is not over ... THEN enter on line 30 ... Single or head of household \$112,500 \$46,700 Married filing jointly or qualifying widow(er) 150,000 70,950 Married filing separately 75,000 35,475 } STMT 17	30	62,176.
	If line 29 is over the amount shown above for your filing status, see instructions.		
31	Subtract line 30 from line 29. If more than zero, go to line 32. If zero or less, enter -0- here and on lines 34 and 36 and skip the rest of Part II	31	122,918.
32	• If you are filing Form 2555 or 2555-EZ, see page 9 of the instructions for the amount to enter. • If you reported capital gain distributions directly on Form 1040, line 13; you reported qualified dividends on Form 1040, line 9b; or you had a gain on both lines 15 and 16 of Schedule D (Form 1040) (as refigured for the AMT, if necessary), complete Part III on page 2 and enter the amount from line 55 here. • All others: If line 31 is \$175,000 or less (\$87,500 or less if married filing separately), multiply line 31 by 26% (.26). Otherwise, multiply line 31 by 28% (.28) and subtract \$3,500 (\$1,750 if married filing separately) from the result.	32	31,959.
33	Alternative minimum tax foreign tax credit (see instructions)	33	
34	Tentative minimum tax. Subtract line 33 from line 32	34	31,959.
35	Tax from Form 1040, line 44 (minus any tax from Form 4972 and any foreign tax credit from Form 1040, line 47). If you used Sch J to figure your tax, the amount from line 44 of Form 1040 must be refigured without using Sch J	35	31,632.
36	AMT. Subtract line 35 from line 34. If zero or less, enter -0-. Enter here and on Form 1040, line 45	36	327.

Part III Tax Computation Using Maximum Capital Gains Rates

37	Enter the amount from Form 6251, line 31. If you are filing Form 2555 or 2555-EZ, enter the amount from line 3 of the worksheet in the instructions	37
38	Enter the amount from line 6 of the Qualified Dividends and Capital Gain Tax Worksheet in the instructions for Form 1040, line 44, or the amount from line 13 of the Schedule D Tax Worksheet on page D-10 of the instructions for Schedule D (Form 1040), whichever applies (as refigured for the AMT, if necessary) (see the instructions). If you are filing Form 2555 or 2555-EZ, see instructions for the amount to enter	38
39	Enter the amount from Schedule D (Form 1040), line 19 (as refigured for the AMT, if necessary) (see instructions). If you are filing Form 2555 or 2555-EZ, see instructions for the amount to enter	39
40	If you did not complete a Schedule D Tax Worksheet for the regular tax or the AMT, enter the amount from line 38. Otherwise, add lines 38 and 39, and enter the smaller of that result or the amount from line 10 of the Schedule D Tax Worksheet (as refigured for the AMT, if necessary). If you are filing Form 2555 or 2555-EZ, see instructions for the amount to enter	40
41	Enter the smaller of line 37 or line 40	41
42	Subtract line 41 from line 37	42
43	If line 42 is \$175,000 or less (\$87,500 or less if married filing separately), multiply line 42 by 26% (.26). Otherwise, multiply line 42 by 28% (.28) and subtract \$3,500 (\$1,750 if married filing separately) from the result	43
44	Enter: <ul style="list-style-type: none"> • \$67,900 if married filing jointly or qualifying widow(er), • \$33,950 if single or married filing separately, or • \$45,500 if head of household. 	44
45	Enter the amount from line 7 of the Qualified Dividends and Capital Gain Tax Worksheet in the instructions for Form 1040, line 44, or the amount from line 14 of the Schedule D Tax Worksheet on page D-10 of the instructions for Schedule D (Form 1040), whichever applies (as figured for the regular tax). If you did not complete either worksheet for the regular tax, enter -0-	45
46	Subtract line 45 from line 44. If zero or less, enter -0-	46
47	Enter the smaller of line 37 or line 38	47
48	Enter the smaller of line 46 or line 47	48
49	Subtract line 48 from line 47	49
50	Multiply line 49 by 15% (.15)	50
If line 39 is zero or blank, skip lines 51 and 52 and go to line 53. Otherwise, go to line 51.		
51	Subtract line 47 from line 41	51
52	Multiply line 51 by 25% (.25)	52
53	Add lines 43, 50, and 52	53
54	If line 37 is \$175,000 or less (\$87,500 or less if married filing separately), multiply line 37 by 26% (.26). Otherwise, multiply line 37 by 28% (.28) and subtract \$3,500 (\$1,750 if married filing separately) from the result	54
55	Enter the smaller of line 53 or line 54 here and on line 32. If you are filing Form 2555 or 2555-EZ, do not enter this amount on line 32. Instead, enter it on line 4 of the worksheet in the instructions	55

ALTERNATIVE MINIMUM TAX RECONCILIATION REPORT

Name(s)

CARL M. & BARBARA LEVIN

Social Security Number

Form Name	Description	Income	Adjustment				Form 6251 Other Adjustment
			Form 6251, Line 18	Form 6251, Line 19	Form 6251, Line 20	Form 6251, Line 21	
E-	RENTAL PORTION OF RESIDENCE - [REDACTED]						
	* REGULAR INCOME	8,444.			102.		
	AMT DEPR ADJ	102.			102.		
	* AMT NET INCOME	8,546.					
K1-	LRS COMPANY						
	* REGULAR INCOME	-5.					
	* AMT NET INCOME	-5.					
K1-	LEVINSON-LEVIN PROPERTIES, LLC						
	* REGULAR INCOME	17,614.			6.		
	AMT ADJUSTMENTS	6.			6.		
	* AMT NET INCOME	17,620.					
	** TOTAL ADJ & PREF **				108.		

SCHEDULE H
(Form 1040)

Department of the Treasury
Internal Revenue Service (99)

Household Employment Taxes

(For Social Security, Medicare, Withheld Income, and Federal Unemployment (FUTA) Taxes)

▶ Attach to Form 1040, 1040NR, 1040-SS, or 1041.

▶ See separate instructions.

OMB No. 1545-1971

2009
Attachment
Sequence No. **44**

Name of employer

Social security number

Employer identification number

CARL M. LEVIN

- A** Did you pay **any one** household employee cash wages of \$1,700 or more in 2009? (If any household employee was your spouse, your child under age 21, your parent, or anyone under age 18, see the line A instructions on page H-4 before you answer this question.)

- ☒ **Yes.** Skip lines B and C and go to line 1.
☐ **No.** Go to line B.

- B** Did you withhold federal income tax during 2009 for any household employee?

- ☐ **Yes.** Skip line C and go to line 5.
☐ **No.** Go to line C.

- C** Did you pay **total** cash wages of \$1,000 or more in **any** calendar quarter of 2008 or 2009 to **all** household employees? (Do not count cash wages paid in 2008 or 2009 to your spouse, your child under age 21, or your parent.)

- ☐ **No.** Stop. Do not file this schedule.
☐ **Yes.** Skip lines 1-9 and go to line 10 on page 2. (Calendar year taxpayers having no household employees in 2009 do not have to complete this form for 2009.)

Part I Social Security, Medicare, and Federal Income Taxes

1	Total cash wages subject to social security taxes (see page H-4)	1	4,860.
2	Social security taxes. Multiply line 1 by 12.4% (.124)	2	603.
3	Total cash wages subject to Medicare taxes (see page H-4)	3	4,860.
4	Medicare taxes. Multiply line 3 by 2.9% (.029)	4	141.
5	Federal income tax withheld, if any	5	
6	Total social security, Medicare, and federal income taxes. Add lines 2, 4, and 5	6	744.
7	Advance earned income credit (EIC) payments, if any	7	
8	Net taxes (subtract line 7 from line 6)	8	744.

- 9** Did you pay **total** cash wages of \$1,000 or more in **any** calendar quarter of 2008 or 2009 to **all** household employees? (Do not count cash wages paid in 2008 or 2009 to your spouse, your child under age 21, or your parent.)

- ☐ **No.** Stop. Include the amount from line 8 above on Form 1040, line 59, and check box b on that line. If you are not required to file Form 1040, see the line 9 instructions on page H-4.
☒ **Yes.** Go to line 10 on page 2.

Part II Federal Unemployment (FUTA) Tax

	Yes	No
10 Did you pay unemployment contributions to only one state? (If you paid contributions to Michigan, check "No.")	<input checked="" type="checkbox"/>	<input type="checkbox"/>
11 Did you pay all state unemployment contributions for 2009 by April 15, 2010? Fiscal year filers, see page H-5	<input checked="" type="checkbox"/>	<input type="checkbox"/>
12 Were all wages that are taxable for FUTA tax also taxable for your state's unemployment tax?	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Next: If you checked the "Yes" box on all the lines above, complete Section A.

If you checked the "No" box on any of the lines above, skip Section A and complete Section B.

Section A

13 Name of the state where you paid unemployment contributions	DC	
14 State reporting number as shown on state unemployment tax return		
15 Contributions paid to your state unemployment fund (see page H-5)	15	76.
16 Total cash wages subject to FUTA tax (see page H-5)	16	4,860.
17 FUTA tax. Multiply line 16 by .008. Enter the result here, skip Section B, and go to line 26	17	39.

Section B

18 Complete all columns below that apply (if you need more space, see page H-5):

(a) Name of state	(b) State reporting number as shown on state unemployment tax return	(c) Taxable wages (as defined in state act)	(d) State experience rate period		(e) State experience rate	(f) Multiply col. (c) by .054	(g) Multiply col. (c) by col. (e)	(h) Subtract col. (g) from col. (f). If zero or less, enter -0-	(i) Contributions paid to state unemployment fund
			From	To					

19 Totals	19	
20 Add columns (h) and (i) of line 19	20	
21 Total cash wages subject to FUTA tax (see the line 16 instructions on page H-5)	21	
22 Multiply line 21 by 6.2% (.062)	22	
23 Multiply line 21 by 5.4% (.054)	23	
24 Enter the smaller of line 20 or line 23	24	
(Michigan employers must use the worksheet in the separate instructions and check here) <input type="checkbox"/>	24	
25 FUTA tax. Subtract line 24 from line 22. Enter the result here and go to line 26	25	

Part III Total Household Employment Taxes

26 Enter the amount from line 8. If you checked the "Yes" box on line C of page 1, enter -0-	26	744.
27 Add line 17 (or line 25) and line 26 (see page H-5)	27	783.

28 Are you required to file Form 1040?

☒ **Yes.** Stop. Include the amount from line 27 above on Form 1040, line 59, and check box b on that line. Do not complete Part IV below.

☐ **No.** You may have to complete Part IV. See page H-5 for details.

Part IV Address and Signature - Complete this part only if required. See the line 28 instructions on page H-5.

Address (number and street) or P.O. box if mail is not delivered to street address	Apt., room, or suite no.
City, town or post office, state, and ZIP code	

Under penalties of perjury, I declare that I have examined this schedule, including accompanying statements, and to the best of my knowledge and belief, it is true, correct, and complete. No part of any payment made to a state unemployment fund claimed as a credit was, or is to be, deducted from the payments to employees. Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge.

Employer's signature	Date
Paid Preparer's signature	Date
Preparer's Firm's name (or yours if self-employed), address, and ZIP code	Check if self-employed <input type="checkbox"/> Preparer's SSN or PTIN
	EIN
	Phone no.

Form **8801**Department of the Treasury
Internal Revenue Service (99)**Credit for Prior Year Minimum Tax -
Individuals, Estates, and Trusts**▶ See separate instructions.
▶ Attach to Form 1040, 1040NR, or 1041.

OMB No. 1545-1073

2009Attachment
Sequence No. **74**

Name(s) shown on return

Identifying number

CARL M. & BARBARA LEVIN**Part I Net Minimum Tax on Exclusion Items**

1 Combine lines 1, 6, 7, and 11 of your 2008 Form 6251. Estates and trusts, see instructions	1	189,376.
2 Enter adjustments and preferences treated as exclusion items (see instructions)	2	23,369.
3 Minimum tax credit net operating loss deduction (see instructions)	3	()
4 Combine lines 1, 2, and 3. If zero or less, enter -0- here and on line 15 and go to Part II. If more than \$214,900 and you were married filing separately for 2008, see instructions	4	212,745.
5 Enter: \$69,950 if married filing jointly or qualifying widow(er) for 2008; \$46,200 if single or head of household for 2008; or \$34,975 if married filing separately for 2008. Estates and trusts, enter \$22,500	5	69,950.
6 Enter: \$150,000 if married filing jointly or qualifying widow(er) for 2008; \$112,500 if single or head of household for 2008; or \$75,000 if married filing separately for 2008. Estates and trusts, enter \$75,000	6	150,000.
7 Subtract line 6 from line 4. If zero or less, enter -0- here and on line 8 and go to line 9	7	62,745.
8 Multiply line 7 by 25% (.25)	8	15,686.
9 Subtract line 8 from line 5. If zero or less, enter -0-. If under age 24 at the end of 2008, see instructions	9	54,264.
10 Subtract line 9 from line 4. If zero or less, enter -0- here and on line 15 and go to Part II. Form 1040NR filers, see instructions	10	158,481.
11 • If for 2008 you filed Form 2555 or 2555-EZ, see page 2 of the instructions for the amount to enter. • If for 2008 you reported capital gain distributions directly on Form 1040, line 13; you reported qualified dividends on Form 1040, line 9b (Form 1041, line 2b(2)); or you had a gain on both lines 15 and 16 of Schedule D (Form 1040) (lines 14a and 15, column (2), of Schedule D (Form 1041)), complete Part III of Form 8801 and enter the amount from line 49 here. Form 1040NR filers, see instructions. • All others: If line 10 is \$175,000 or less (\$87,500 or less if married filing separately for 2008), multiply line 10 by 26% (.26). Otherwise, multiply line 10 by 28% (.28) and subtract \$3,500 (\$1,750 if married filing separately for 2008) from the result. Form 1040NR filers, see instructions.	11	41,205.
12 Minimum tax foreign tax credit on exclusion items (see instructions)	12	
13 Tentative minimum tax on exclusion items. Subtract line 12 from line 11	13	41,205.
14 Enter the amount from your 2008 Form 6251, line 35, or 2008 Form 1041, Schedule I, line 55	14	40,020.
15 Net minimum tax on exclusion items. Subtract line 14 from line 13. If zero or less, enter -0-	15	1,185.

LHA For Paperwork Reduction Act Notice, see instructions.

Form 8801 (2009)

Part II Current Year Nonrefundable and Refundable Credits and Carryforward to 2010

16 Enter the amount from your 2008 Form 6251, line 36, or 2008 Form 1041, Schedule I, line 56	16	1,230.
17 Enter the amount from line 15	17	1,185.
18 Subtract line 17 from line 16. If less than zero, enter as a negative amount	18	45.
19 2008 credit carryforward. Enter the amount from your 2008 Form 8801, line 31	19	99.
20 Enter your 2008 unallowed qualified electric vehicle credit (see instructions)	20	
21 Combine lines 18 through 20. If zero or less, enter -0-	21	144.
22 Enter 50% (.50) of the total interest and penalties you paid before October 3, 2008, on alternative minimum tax attributable to the exercise of incentive stock options for 2007 or any prior year	22	
23 Add lines 21 and 22. If zero, stop here and see instructions	23	144.
24 Enter your 2009 regular income tax liability minus allowable credits (see instructions)	24	31,632.
25 Enter the amount from your 2009 Form 6251, line 34, or 2009 Form 1041, Schedule I, line 54	25	31,959.
26 Subtract line 25 from line 24. If zero or less, enter -0-	26	0.
27 Current year nonrefundable credit. Enter the smaller of line 23 or line 26. Also enter this amount on your 2009 Form 1040, line 53 (check box b); Form 1040NR, line 49 (check box b); or Form 1041, Schedule G, line 2d	27	0.
28 • Estates and trusts: Leave lines 28 and 29 blank and go to line 30. • Individuals: Did you have a minimum tax credit carryforward to 2007 (on your 2006 Form 8801, line 26) or pay any interest or penalties before October 3, 2008, on alternative minimum tax attributable to the exercise of incentive stock options for 2007 or any prior year? <input type="checkbox"/> No. Leave lines 28 and 29 blank and go to line 30. <input checked="" type="checkbox"/> Yes. Complete Part IV of Form 8801 to figure the amount to enter	28	17.
29 Is line 28 more than line 27? <input type="checkbox"/> No. Leave line 29 blank and go to line 30. <input checked="" type="checkbox"/> Yes. Subtract line 27 from line 28. This is your current year refundable credit. Enter the result here and on your 2009 Form 1040, line 70 (check box c), or Form 1040NR, line 64 (check box c)	29	17.
30 Credit carryforward to 2010. Subtract the larger of line 27 or line 28 from line 23. Keep a record of this amount because you may use it in future years	30	127.

Form 8801 (2009)

Part III Tax Computation Using Maximum Capital Gains Rates

Caution. If you did not complete the 2008 Qualified Dividends and Capital Gain Tax Worksheet, the 2008 Schedule D Tax Worksheet, or Part V of the 2008 Schedule D (Form 1041), see the instructions before completing this part.

- 31 Enter the amount from Form 8801, line 10. If you filed Form 2555 or 2555-EZ for 2008, enter the amount from line 3 of the worksheet on page 2 of the instructions

31

Caution. If for 2008 you filed Form 1040NR, 1041, 2555, or 2555-EZ, see page 4 of the instructions before completing lines 32, 33, and 34.

- 32 Enter the amount from line 6 of your 2008 Qualified Dividends and Capital Gain Tax Worksheet, the amount from line 13 of your 2008 Schedule D Tax Worksheet, or the amount from line 22 of the 2008 Schedule D (Form 1041), whichever applies*

32

If you figured your 2008 tax using the 2008 Qualified Dividends and Capital Gain Tax Worksheet, skip line 33 and enter the amount from line 32 on line 34. Otherwise, go to line 33.

- 33 Enter the amount from line 19 of your 2008 Schedule D (Form 1040), or line 14b, column (2), of the 2008 Schedule D (Form 1041)

33

- 34 Add lines 32 and 33, and enter the smaller of that result or the amount from line 10 of your 2008 Schedule D Tax Worksheet

34

- 35 Enter the smaller of line 31 or line 34

35

- 36 Subtract line 35 from line 31

36

- 37 If line 36 is \$175,000 or less (\$87,500 or less if married filing separately for 2008), multiply line 36 by 26% (.26). Otherwise, multiply line 36 by 28% (.28) and subtract \$3,500 (\$1,750 if married filing separately for 2008) from the result. Form 1040NR filers, see instructions

37

- 38 Enter:

- \$65,100 if married filing jointly or qualifying widow(er) for 2008,
- \$32,550 if single or married filing separately for 2008,
- \$43,650 if head of household for 2008, or
- \$2,200 for an estate or trust.

Form 1040NR filers, see instructions

38

- 39 Enter the amount from line 7 of your 2008 Qualified Dividends and Capital Gain Tax Worksheet, the amount from line 14 of your 2008 Schedule D Tax Worksheet, or the amount from line 23 of the 2008 Schedule D (Form 1041), whichever applies. If you did not complete either worksheet or Part V of the 2008 Schedule D (Form 1041), enter -0-. Form 1040NR filers, see instructions

39

- 40 Subtract line 39 from line 38. If zero or less, enter -0-

40

- 41 Enter the smaller of line 31 or line 32

41

- 42 Enter the smaller of line 40 or line 41

42

- 43 Subtract line 42 from line 41

43

- 44 Multiply line 43 by 15% (.15)

44

If line 33 is zero or blank, skip lines 45 and 46 and go to line 47. Otherwise, go to line 45.

- 45 Subtract line 41 from line 35

45

- 46 Multiply line 45 by 25% (.25)

46

- 47 Add lines 37, 44, and 46

47

- 48 If line 31 is \$175,000 or less (\$87,500 or less if married filing separately for 2008), multiply line 31 by 26% (.26). Otherwise, multiply line 31 by 28% (.28) and subtract \$3,500 (\$1,750 if married filing separately for 2008) from the result. Form 1040NR filers, see instructions

48

- 49 Enter the smaller of line 47 or line 48 here and on line 11. If you filed Form 2555 or 2555-EZ for 2008, do not enter this amount on line 11. Instead, enter it on line 4 of the worksheet on page 2 of the instructions

49

* The 2008 Qualified Dividends and Capital Gain Tax Worksheet is on page 38 of the 2008 Instructions for Form 1040. The 2008 Schedule D Tax Worksheet is on page D-10 of the 2008 Instructions for Schedule D (Form 1040) (page 8 of the 2008 Instructions for Schedule D (Form 1041)).

Part IV Tentative Refundable Credit

50	Enter the amount from line 21	50	144.
51	Enter the total of lines 18 and 20 from your 2007 Form 8801. If zero or less, enter -0-	51	7.
52	Enter the total of lines 18 and 20 from your 2008 Form 8801. If zero or less, enter -0-	52	58.
53	Enter the total of lines 18 and 20 from your 2009 Form 8801. If zero or less, enter -0-	53	45.
54	Add lines 51 through 53	54	110.
55	Long-term unused minimum tax credit. Subtract line 54 from line 50 (If zero or less, enter -0- here and on line 59 and go to line 60)	55	34.
56	Multiply line 55 by 50% (.50)	56	17.
57	Enter the amount from your 2008 Form 8801, line 61	57	
58	Enter the larger of line 56 or line 57	58	17.
59	Enter the smaller of line 55 or line 58	59	17.
60	Enter the amount from line 22	60	
61	Add lines 59 and 60. Enter the result here and on line 28	61	17.

Form 8801 (2009)

918711
10-07-09

▼ DETACH HERE ▼

Form **4868**

Department of the Treasury
Internal Revenue Service (99)

**Application for Automatic Extension of Time
To File U.S. Individual Income Tax Return**

For calendar year 2009, or other tax year beginning

, 2009, ending

1019

2009

Part I Identification

1 Your name(s)

CARL M. LEVIN & BARBARA LEVIN
[REDACTED]
[REDACTED]

2 Your social security number

[REDACTED]

3 Spouse's social security number

[REDACTED]

Part II Individual Income Tax

4 Estimate of total tax liability for 2009 \$ 30,738.

5 Total 2009 payments 30,738.

6 Balance due. Subtract line 5
from line 4 0.

7 Amount you are paying 0.

8 Check here if you are "out of the country" and a U.S.
citizen or resident ☐

9 Check here if you file Form 1040NR or 1040NR-EZ and did not receive
wages as an employee subject to U.S. income tax withholding ☐

362328973 JJ LEVI 30 0 200912 670

CHECK ONLY ONE BOX:

- A. SINGLE, HEAD OF HOUSEHOLD, OR QUALIFYING WIDOW(ER)
 X B. MARRIED FILING JOINTLY
 C. MARRIED FILING SEPARATELY AND LIVED WITH YOUR SPOUSE
 AT ANY TIME DURING 2009
 D. MARRIED FILING SEPARATELY AND LIVED APART FROM YOUR SPOUSE
 FOR ALL OF 2009

1. ENTER THE TOTAL AMOUNT FROM BOX 5 OF ALL YOUR FORMS SSA-1099 AND RRB-1099. ALSO, ENTER THIS AMOUNT ON FORM 1040, LINE 20A.	41,855.
IF YOU CHECKED BOX B: TAXPAYER AMOUNT	25,763.
SPOUSE AMOUNT	16,092.
2. ENTER ONE HALF OF LINE 1	20,928.
3. ADD THE AMOUNTS ON FORM 1040, LINE 7, 8B, 9A, 10 THRU 14, 15B, 16B, 17 THRU 19, 21 AND SCHEDULE B, LINE 2. DO NOT INCLUDE ANY AMOUNTS FROM BOX 5 OF FORMS SSA-1099 OR RRB-1099	182,173.
4. ENTER THE AMOUNT OF ANY EXCLUSIONS FROM FOREIGN EARNED INCOME, FOREIGN HOUSING, INCOME FROM U.S. POSSESSIONS, OR INCOME FROM PUERTO RICO BY BONA FIDE RESIDENTS OF PUERTO RICO THAT YOU CLAIMED	203,101.
5. ADD LINES 2, 3, AND 4.	0.
6. ADD THE AMOUNTS ON FORM 1040, LINES 23 THROUGH LINE 32, AND ANY WRITE-IN ADJUSTMENTS YOU ENTERED ON THE DOTTED LINE NEXT TO LINE 36.	203,101.
7. SUBTRACT LINE 6 FROM LINE 5	32,000.
8. ENTER: \$25,000 IF YOU CHECKED BOX A OR D, OR \$32,000 IF YOU CHECKED BOX B, OR \$-0- IF YOU CHECKED BOX C.	171,101.
9. IS THE AMOUNT ON LINE 8 LESS THAN THE AMOUNT ON LINE 7? [] NO. STOP. NONE OF YOUR SOCIAL SECURITY BENEFITS ARE TAXABLE. ENTER -0- ON FORM 1040, LINE 20B. IF YOU ARE MARRIED FILING SEPARATELY AND YOU LIVED APART FROM YOUR SPOUSE FOR ALL OF 2009, BE SURE YOU ENTERED 'D' TO THE RIGHT OF THE WORD "BENEFITS" ON LINE 20A. [X] YES. SUBTRACT LINE 8 FROM LINE 7	12,000.
10. ENTER \$9,000 IF YOU CHECKED BOX A OR D, \$12,000 IF YOU CHECKED BOX B \$-0- IF YOU CHECKED BOX C	159,101.
11. SUBTRACT LINE 10 FROM LINE 9. IF ZERO OR LESS, ENTER -0-.	12,000.
12. ENTER THE SMALLER OF LINE 9 OR LINE 10	6,000.
13. ENTER ONE HALF OF LINE 12.	6,000.
14. ENTER THE SMALLER OF LINE 2 OR LINE 13	135,236.
15. MULTIPLY LINE 11 BY 85% (.85). IF LINE 11 IS ZERO, ENTER -0-.	141,236.
16. ADD LINES 14 AND 15.	35,577.
17. MULTIPLY LINE 1 BY 85% (.85)	35,577.
18. TAXABLE BENEFITS. ENTER THE SMALLER OF LINE 16 OR LINE 17 * ALSO ENTER THIS AMOUNT ON FORM 1040, LINE 20B	

CARL M. & BARBARA LEVIN

FORM 1040

STATE AND LOCAL INCOME TAX REFUNDS

STATEMENT

2

	2008	2007	2006
	MICHIGAN		
GROSS STATE/LOCAL INC TAX REFUNDS	734.		
LESS: TAX PAID IN FOLLOWING YEAR	38.		
NET TAX REFUNDS MICHIGAN	696.		
TOTAL NET TAX REFUNDS	696.		

FORM 1040		TAXABLE STATE AND LOCAL INCOME TAX REFUNDS		STATEMENT	3
		2008	2007	2006	
NET TAX REFUNDS FROM STATE AND LOCAL INCOME TAX REFUNDS STMT.		696.			
LESS: REFUNDS-NO BENEFIT DUE TO AMT -SALES TAX BENEFIT REDUCTION		696.			
1	NET REFUNDS FOR RECALCULATION				
2	TOTAL ITEMIZED DEDUCTIONS BEFORE PHASEOUT	45,975.			
3	DEDUCTION NOT SUBJ TO PHASEOUT				
4	NET REFUNDS FROM LINE 1				
5	LINE 2 MINUS LINES 3 AND 4	45,975.			
6	MULT LN 5 BY APPL SEC. 68 PCT	12,260.			
7	PRIOR YEAR AGI	235,351.			
8	ITEM. DED. PHASEOUT THRESHOLD	159,950.			
9	SUBTRACT LINE 8 FROM LINE 7 (IF ZERO OR LESS, SKIP LINES 10 THROUGH 15, AND ENTER AMOUNT FROM LINE 1 ON LINE 16)	75,401.			
10	MULT LN 9 BY APPL SEC. 68 PCT	754.			
11	ALLOWABLE ITEMIZED DEDUCTIONS (LINE 5 LESS THE LESSER OF LINE 6 OR LINE 10)	45,221.			
12	ITEM DED. NOT SUBJ TO PHASEOUT				
13A	TOTAL ADJ. ITEMIZED DEDUCTIONS	45,221.			
13B	PRIOR YR. STD. DED. AVAILABLE	14,000.			
14	PRIOR YR. ALLOWABLE ITEM. DED.	45,221.			
15	SUBTRACT THE GREATER OF LINE 13A OR LINE 13B FROM LINE 14				
16	TAXABLE REFUNDS (LESSER OF LINE 15 OR LINE 1)				
17	ALLOWABLE PRIOR YR. ITEM. DED.	45,221.			
18	PRIOR YEAR STD. DED. AVAILABLE	14,000.			
19	SUBTRACT LINE 18 FROM LINE 17	31,221.			
20	LESSER OF LINE 16 OR LINE 19				
21	PRIOR YEAR TAXABLE INCOME	183,130.			
22	AMOUNT TO INCLUDE ON FORM 1040, LINE 10 * IF LINE 21 IS -0- OR MORE, USE AMOUNT FROM LINE 20 * IF LINE 21 IS A NEGATIVE AMOUNT, NET LINES 20 AND 21				0.
STATE AND LOCAL INCOME TAX REFUNDS PRIOR TO 2006					
TOTAL TO FORM 1040, LINE 10					0.

CARL M. & BARBARA LEVIN

FORM 1040

IRA DISTRIBUTIONS

STATEMENT

4

NAME OF PAYER

GROSS
DISTRIBUTION

TAXABLE AMOUNT

AMERICAN FUNDS

8,994.

8,994.

TOTAL TO FORM 1040, LINE 15

8,994.

8,994.

FORM 1040

TAX-EXEMPT INTEREST

STATEMENT

5

NAME OF PAYER

AMOUNT

FIDELITY

35.

TOTAL TO FORM 1040, LINE 8B

35.

CARL M. & BARBARA LEVIN

FORM 1040 REFUNDS ATTRIBUTABLE TO EST. TAX PAID FOLLOWING YR STATEMENT 6

	2008	STATE REFUND	AMOUNT SUBTRACTED FROM TAXABLE REFUND
STATE TAX PAID IN FOLLOW YEAR	370.		
	X	734. =	38.
TOTAL STATE TAX PAID 2008	7,215.		

FORM 1040 WAGES RECEIVED AND TAXES WITHHELD STATEMENT 7

T S EMPLOYER'S NAME	AMOUNT PAID	FEDERAL TAX WITHHELD	STATE TAX WITHHELD	CITY SDI TAX W/H	FICA TAX	MEDICARE TAX
T UNITED STATES SENATE	146,987.	30,721.	5,611.		6,622.	2,450.
TOTALS	146,987.	30,721.	5,611.		6,622.	2,450.

FORM 1040 FEDERAL INCOME TAX WITHHELD STATEMENT 8

T S DESCRIPTION	AMOUNT
T UNITED STATES SENATE	30,721.
T AMERICAN FUNDS	1,796.
T WITHHOLDING FROM FORM 1099-SSA	7,986.
S WITHHOLDING FROM FORM 1099-SSA	4,988.
TOTAL TO FORM 1040, LINE 61	45,491.

SCHEDULE A OTHER TAXES STATEMENT 9

DESCRIPTION	AMOUNT
PERSONAL PROPERTY TAXES	
LIONS DEN - REAL ESTATE	3,176.
TOTAL TO SCHEDULE A, LINE 8	3,176.

STATEMENT 10

AMOUNT
30% LIMIT

[REDACTED]

32,747.

32,747.

TOTAL TO SCHEDULE A, LINE 16

SCHEDULE A

ITEMIZED DEDUCTIONS WORKSHEET


STATEMENT 11

1.	ENTER THE TOTAL OF THE AMOUNTS FROM SCHEDULE A, LINES 4, 9, 15, 19, 20, 27, AND 28	56,036.
2.	ENTER THE TOTAL OF THE AMOUNTS FROM SCHEDULE A, LINES 4, 14, AND 20, PLUS ANY GAMBLING AND CASUALTY OR THEFT LOSSES INCLUDED ON LINE 28.	0.
3.	IS THE AMOUNT ON LINE 2 LESS THAN THE AMOUNT ON LINE 1? IF NO, YOUR DEDUCTION IS NOT LIMITED. ENTER THE AMOUNT FROM LINE 1 ABOVE ON SCHEDULE A, LINE 29. IF YES, SUBTRACT LINE 2 FROM LINE 1	56,036.
4.	MULTIPLY LINE 3 BY 80% (.80).	44,829.
5.	ENTER THE AMOUNT FROM FORM 1040, LINE 38.	217,715.
6.	ENTER: \$166,800 (\$83,400 IF MARRIED FILING SEPARATELY)	166,800.
7.	IS THE AMOUNT ON LINE 6 LESS THAN THE AMOUNT ON LINE 5? IF NO, YOUR DEDUCTION IS NOT LIMITED. ENTER THE AMOUNT FROM LINE 1 ABOVE ON SCHEDULE A, LINE 29. IF YES, SUBTRACT LINE 6 FROM LINE 5	50,915.
8.	MULTIPLY LINE 7 BY 3% (.03)	1,527.
9.	ENTER THE SMALLER OF LINE 4 OR LINE 8	1,527.
10.	DIVIDE LINE 9 BY 1.5	1,018.
11.	SUBTRACT LINE 10 FROM LINE 9	509.
12.	TOTAL ITEMIZED DEDUCTIONS. SUBTRACT LINE 11 FROM LINE 1. ENTER THE RESULT HERE AND ON SCHEDULE A, LINE 29	55,527.

SCHEDULE B

TAX-EXEMPT INTEREST

STATEMENT 12

NAME OF PAYER	AMOUNT
FIDELITY 	35.
TOTAL TAX-EXEMPT INTEREST TO SCHEDULE B, LINE 1	35.

SCHEDULE E OTHER EXPENSES STATEMENT 13

RENTAL PORTION OF RESIDENCE -

DESCRIPTION	AMOUNT
YARD MAINTENANCE	582.
PEST CONTROL	195.
PLUMBING	452.
PAINTING	197.
KEYS	27.
TOTAL TO SCHEDULE E, PAGE 1, LINE 18	1,453.

FORM 6198 ALLOCATION OF INCOME AND AMOUNT AT-RISK STATEMENT 14

LRS COMPANY

DESCRIPTION	INCOME	LOSS	PERCENT OF LOSS	ALLOCATION OF INCOME	ALLOCATION OF AMOUNT AT-RISK
ORDINARY		840.	.249702735	1.	0.
SCHEDULE E C/O		2,524.	.750297265	4.	0.
INTEREST	5.				
TOTALS	5.	3,364.	1.000000000	5.	

FORM 6198 ALLOCATION OF ALLOWABLE LOSSES STATEMENT 15

LRS COMPANY

DESCRIPTION	LOSS	ALLOCATION OF INCOME	ALLOCATION OF AT-RISK	ALLOWABLE LOSS	DISALLOWED LOSS
ORDINARY	840.	1.	0.	1.	839.
SCHEDULE E C/O	2,524.	4.	0.	4.	2,520.
TOTALS	3,364.	5.	0.	5.	3,359.

FORM 6251

PASSIVE ACTIVITIES

STATEMENT 16

NAME OF ACTIVITY	FORM	NET INCOME (LOSS)		ADJUSTMENT
		AMT	REGULAR	
LRS COMPANY	SCH E	-5.	-5.	
LEVINSON-LEVIN	SCH E			
PROPERTIES, LLC		17,620.	17,614.	6.
RENTAL PORTION OF	SCH E			
RESIDENCE - [REDACTED]		8,546.	8,444.	102.
TOTAL TO FORM 6251, LINE 20				108.

FORM 6251

EXEMPTION WORKSHEET

STATEMENT 17

- 1 ENTER: \$46,700 IF SINGLE OR HEAD OF HOUSEHOLD; \$70,950 IF
MARRIED FILING JOINTLY OR QUALIFYING WIDOW(ER); \$35,475
IF MARRIED FILING SEPARATELY. 70,950.
- 2 ENTER YOUR ALTERNATIVE MINIMUM TAXABLE INCOME
(AMTI) FORM 6251, LINE 29 185,094.
- 3 ENTER: \$112,500 IF SINGLE OR HEAD OF HOUSEHOLD;
\$150,000 IF MARRIED FILING JOINTLY OR
QUALIFYING WIDOW(ER); \$75,000 IF MARRIED
FILING SEPARATELY 150,000.
- 4 SUBTRACT LINE 3 FROM LINE 2. IF ZERO OR LESS
ENTER -0- 35,094.
- 5 MULTIPLY LINE 4 BY 25% (.25). 8,774.
- 6 SUBTRACT LINE 5 FROM LINE 1. IF ZERO OR LESS, ENTER -0-. IF
ANY OF THE THREE CONDITIONS UNDER CERTAIN CHILDREN UNDER
AGE 24 APPLY TO YOU, COMPLETE LINES 7 THROUGH 10.
OTHERWISE, STOP HERE AND ENTER THIS AMOUNT ON FORM 6251,
LINE 30, AND GO TO FORM 6251, LINE 31 62,176.
- 7 MINIMUM EXEMPTION AMOUNT FOR CERTAIN CHILDREN UNDER AGE 24. .
- 8 ENTER YOUR EARNED INCOME, IF ANY.
- 9 ADD LINES 7 AND 8
- 10 ENTER THE SMALLER OF LINE 6 OR LINE 9 HERE AND ON FORM 6251,
LINE 30, AND GO TO FORM 6251, LINE 31

FORM 6251

INTEREST FROM SPECIFIED PRIVATE ACTIVITY BONDS

STATEMENT 18

DESCRIPTION

AMOUNT

FIDELITY [REDACTED]

18.

TOTAL TO FORM 6251, LINE 13

18.